



Retirement Investors' Club (RIC)

457/401a Plans

Look *forward* to retirement!

401a Roll-in Form

You may request to move money from an existing eligible retirement plan into your RIC 401a account. This is a nontaxable transfer. Please contact your previous plan administrator to determine if you must complete any required forms before the plan will release the funds.

Personal Information

Name _____ Social Security # _____
Last First MI

Telephone (work) _____ Telephone (home) _____

Roll-in Instructions

Roll my previous retirement account into my RIC 401a account with:

Horace Mann MassMutual TIAA-CREF VALIC Voya*

Previous Plan Information

The previous plan administrator must complete this section

Plan type: IRA (Traditional, Rollover, Simple) 401(k) 401(a) 403(b) 403(a) SEP
 Other qualified plan _____

Previous Employer Name (if applicable) _____

Account Number _____ Approximate rollover amount \$ _____

Previous plan administrator/trustee/custodian authorization

I am the Plan Administrator or Trustee for the previous plan named on this form. I affirm that the plan is eligible to make this direct rollover.

Signature _____

Date _____

Printed Name _____

Phone # _____

Company Name _____

Fax # _____

Address _____

City, State, Zip Code _____

Participant Signature

I understand that only certain types of distributions are eligible for rollover treatment and that it is solely my responsibility to ensure such eligibility. I understand my transferred funds will be subject to the rules and restrictions of the RIC 401a account.

X _____
Signature

_____ Date

Submit Form

Please submit this completed form, along with a copy of any forms required by your previous plan

Mail to: DAS-HRE
Attention: RIC
1305 E. Walnut
Des Moines, IA 50319

Fax: 515-281-5102

Scan/email: terri.marshall@iowa.gov

*Formerly ING

